



## **MONTANA STATE HOSPITAL POLICY AND PROCEDURE**

### **Volunteers**

**Effective Date:** September 1, 2002

**Policy #:** HR-19

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#### **I. PURPOSE:**

- A. To establish and define the guidelines necessary to operate a volunteer program within Montana State Hospital which meets established objectives.
- B. To obtain the services of volunteers to perform activities and tasks which would not normally be provided, if not for the efforts of volunteers. Volunteers provide service support and supplement regular Montana State Hospital employees or contractors, but do not replace or displace them. Volunteers should not perform duties which would normally be carried out by paid staff.
- C. To improve the level and quality of service provided by Montana State Hospital.
- D. To provide disabled and/or disadvantaged, or interested individuals an opportunity to gain specific experience through volunteer activities.

#### **II. POLICY:** Montana State Hospital shall accommodate the services of volunteers in hospital programs or activities when those services benefit and enhance the resources and the citizens of the State of Montana, and do not displace or replace existing employees or contractors.

#### **III. DEFINITIONS:**

- A. Volunteer – A person, who of his or her own free will, provides goods and services without financial gain. Volunteers do not displace or replace existing employees or contractors.
- B. Volunteer Activity – Activities which would not normally be provided if not for volunteers. Volunteers should not perform duties which would normally be carried out by paid staff.

#### **IV. RESPONSIBILITIES:**

- A. The Human Resources Department has the overall responsibility for the administration, coordination, and implementation of the volunteer program.
- B. Department Managers may recruit volunteers, negotiate volunteer service agreements, and approve such agreements for volunteers assigned to appropriate programs under their individual areas of supervision.

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- C. Supervisors may be delegated the authority, through the appropriate department director, to recruit volunteer applicants, negotiate volunteer service agreements with individuals or organizations, and approve such agreements for volunteers. This authority may not be re-delegated.

#### V. PROCEDURE:

##### A. Guidelines for implementation:

1. Recruitment – Volunteers are not employees (FTE) of Montana State Hospital. Volunteers may be recruited from any source or location. Volunteers must successfully pass a criminal background check. Minority groups and disabled persons should be included in the recruitment efforts. Volunteers may be recruited from such groups as: local university students, senior citizen organizations, community service organizations, volunteer bureaus, social or civic organizations, or handicapped or minority organizations. Montana State Hospital shall provide equal opportunity and equal departmental services to all persons regardless of race, color, religion, sex, age, physical, mental or sensory disability, marital status, national origin, or political belief with the exception of special programs established by law. Equal opportunity applies to all aspects of personnel policy and practice in the recruitment, utilization, development, and treatment of volunteers.
2. Volunteer Service Agreement – A Volunteer Service Agreement will be used to document volunteer services to be performed and the terms and conditions of such service. Volunteers may not perform volunteer services until the agreement is signed by both parties. Agreements may be amended by consent of both parties. Items which must be covered within the agreement include, but are not limited to:
  - a. volunteer activities, approximate time commitment, and approximate duration of volunteer position;
  - b. training to be provided by Montana State Hospital;
  - c. information, materials, and supplies to be furnished by Montana State Hospital;
  - d. equipment the volunteer will furnish to perform the activity (if any);
  - e. how, and/or where lodging will be provided (if applicable);
  - f. identification of costs, if any, may be reimbursed and by what method;
  - g. other pertinent information; and
  - h. signatures of volunteer and agency representative.

- B. Insurance, Worker's Compensation, usage of state property and incidental expenses:

1. Insurance – When volunteers are involved in the course and scope of state activity, they would normally be covered under the state Tort Claim Act and the state self-insurance plan for liability claims. Under Section 2-9-305, M.C.A., they would be personally immune for liability claims against them for any claims while volunteering for the state. The state would be named as a defendant; except, no protection is afforded by the state against claims alleging intentional or felonious acts or denial of civil rights under 42 USC 1983, and no protection is offered the individual for violations under 42 USC 1983 or the state’s self-insurance plan.

If volunteers use personal vehicles for state business, minimum coverage for bodily injuries and property damage must be carried as required by law. Their insurance would be primary before any coverage would be afforded by the state. Commuting between the volunteer’s residence and the activity site is not considered state business.

2. Workers’ Compensation – Volunteers will be covered under Workers’ Compensation. A copy of the volunteer agreement will be sent to the payroll clerk for initiation of Workers’ Compensation coverage. Periodically, not to exceed three months, the supervisor involved must report the volunteer’s time (hours), involved in volunteer activities, to Payroll. A Supplemental Workers’ Compensation Quarterly Report from Payroll includes the volunteers’ hours. The volunteer time report will include any changes in status (i.e. volunteer condition stops). The volunteer time report should include volunteer’s name, social security number, hours volunteered, equivalent classification title Workers’ Compensation class code, and program code to charge the premium cost. Payroll will submit the consolidated quarterly report on letterhead to:

Employer Accounts Supervisor  
State Fund  
Workers’ Compensation Division  
Helena, MT 59620

3. Safety and Accident Reporting – Volunteers are covered under hospital policy for both motor vehicle and occupational injuries. The procedures, therein, will apply in case of accident.
4. Minimum Wage and Overtime Compensation – Volunteers do not have the status of public employees with respect to provisions of law and are exempted from minimum wage and overtime compensation in accordance with state and federal statutes.
5. Usage of State Property – Volunteers may use state property (including motor vehicles) in the performance of their volunteer activities, if authorized. If an accident occurs while the volunteer is operating state equipment, state insurance coverage is provided for the state and the

volunteer against claims made by others who may have been injured or whose property may have been damaged. If an injury occurred to the volunteer, protection would come from worker's compensation.

6. Incidental Expenses – Volunteers receive no salary but may be reimbursed for incidental expenses such as transportation, lodging, meals, and other volunteer related costs, when necessary and approved for the performance of the volunteer activity. Lodging may be provided in lieu of reimbursement when the volunteer assignment requires overnight lodging. Housing will not, however, be used to barter volunteer services.

The authorizing document for such reimbursement shall be the Volunteer Service Agreement. The State of Montana Travel Expense Voucher will be used for reimbursement. The current state rules for travel and mileage reimbursement are authorized.

C. Interviews, Orientation, and Training

1. Interviews – the volunteer interview should provide both the volunteer and the hospital the opportunity to express their expectations. The volunteer may be seeking an opportunity for:
  - a. service to others,
  - b. skill building,
  - c. experience,
  - d. contacts,
  - e. references, and/or
  - f. social exchange.

When both parties agree on the scope of the volunteer service, the volunteer agreement should be completed and signed.

2. Orientation – Orientation is as important for volunteers as for new employees and should include the same information. Volunteers will be effective when they understand hospital goals and objectives and in-house policies and procedures. Orientation sessions should include:
  - a. informing the volunteer of programs and services provided by the hospital
  - b. familiarizing the volunteer with the facilities
  - c. introducing the volunteer to co-workers
  - d. covering policies relating to dress, telephone usage, parking, office equipment, office hours, break areas, and volunteer procedures regarding absences.
3. Training and Orientation – Volunteers should receive the minimum training/orientation necessary to enhance their service. The emphasis

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should be on training which is specific to volunteer activities and which can be immediately applied to the volunteer position (Attachment A).

4. Volunteers must be tuberculosis (TB) tested, or certified TB free, prior to providing any volunteer services.

#### D. Supervision

1. Volunteers must receive adequate supervision. A record of the number of hours volunteered and the accomplishments reported must be kept by the volunteer's supervisor. Volunteer services are ended when the volunteer agreement is terminated by either party.

#### E. Record Keeping

1. Many volunteers seek qualifying experience. As such, they expect detailed information on the volunteer positions held, including starting and ending dates, numbers of hours volunteered and description of assignments. A volunteer personnel file will be maintained for each volunteer. It must contain the volunteer agreement, record of hours volunteered, accomplishments, training received, and special awards or commendations, etc. At the termination of the volunteer agreement, upon request or need of the volunteer the responsible supervisor shall write a referral letter to include:
  - a. description of volunteer activities,
  - b. volunteer's period of service, and
  - c. notation of volunteer's performance

- F. Credit for Service – A volunteer's service will be considered when evaluating the qualifications of the volunteer seeking employment with the hospital

- VI. REFERENCES:** A. 2-15-112, Montana Code Annotated  
B. 2-9-305, Montana Code Annotated

- VII. COLLABORATED WITH:** Director of Nursing Services, Director of Treatment and Rehabilitation, Chief Financial Officer, and Director of Information Resources

- VIII. RESCISSIONS:** #HR-19, *Volunteers* dated May 12, 2000; MSH Policy #TCU-10-99-N, *Transitional Care Units use of Students, Interns, and Volunteers*

- IX. DISTRIBUTION:** All hospital policy manuals and supervisors

- X. REVIEW AND REISSUE DATE:** September 2005

- XI. FOLLOW-UP RESPONSIBILITY:** Director of Human Resources

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Ed Amberg Date  
Hospital Administrator

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Rhonda Klima Date  
Acting Director of Human Resources